

Backdating -- Frequently Asked Questions

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*If you still have questions
regarding backdates,
please e-mail:*

Sphelp@commerce.state.wi.us

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SECTION 1: What is backdating? (back)

Wisconsin ServicePoint (WISP) records a date entered for an assessment question on from the day you enter it and into the future. The answer doesn't include the past, unless you backdate it.

WISP defaults to the date and time information was entered in the system. This is the effective date of the information. If you are entering data for a date in the past then you must backdate or change the *effective date*.

Backdating comes in two forms.

- 1. Backdating can simply be filling in the date fields for the various functions in Wisconsin ServicePoint with the correct date.
- 2. Backdating can also mean making the system go back in time so that WISP thinks it is literally a date in the past. This is using the backdate *mode*.

Depending on your situation, you will likely employ both methods. The following is a brief summary of which method to use for various types of data or assessments.

Change the Date Field for the following:

- ✓ Households
- ✓ Entry / Exit
- ✓ Service Transaction
- ✓ Shelter Point

Use Back Date Mode for Assessments:

- ✓ HUD Universal Data Elements
- ✓ HUD 40118 Assessment
- ✓ WI Assessment
- ✓ WI Medical Assessment
- ✓ WI Exit Assessment

1.1 When do I need to backdate? [\(back\)](#)

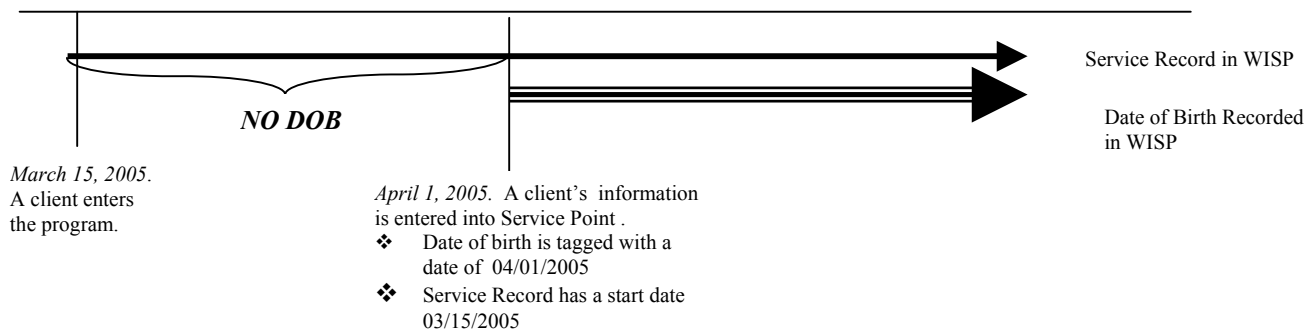
You need to backdate every time you enter a client into a program, provide a service for a client, or enter demographic information about a client for a date in the past.

1.2 Why would I need to backdate? [\(back\)](#)

Assume that you enter a client into Wisconsin ServicePoint on April 1, 2005, but that client began your program March 15, 2005.

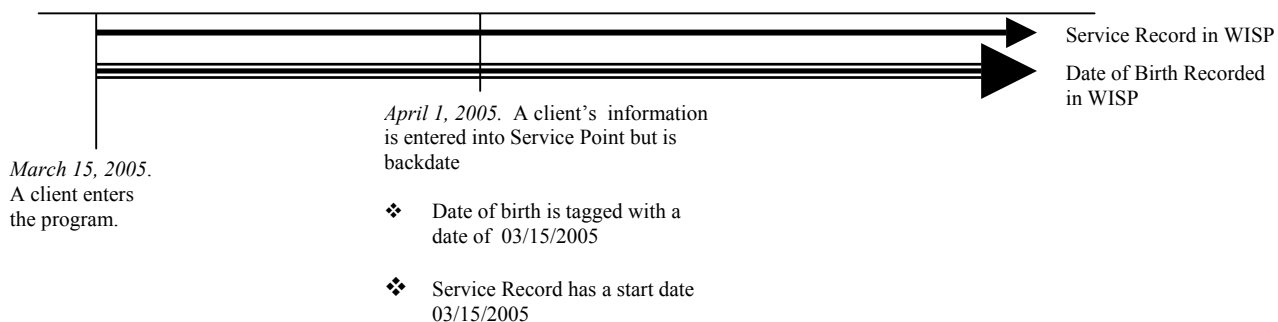
You must enter the appropriate service start date so that the system correctly calculates the length of time a client stays in your program. Thus you need to backdate your service start to March 15, 2005. The following scenario considers what happens if you do not backdate the corresponding information that accompanies the start date.

First, consider what happens to the client's birth date without backdating the HUD Universal Data Elements Assessment.



The implication of this, when you run a Clients Served report, will be that the software reads that the client entering the program on March 15 did not have a birth date and will put the client into the 'No DOB' category. The system will also read that at some point during the service provision the client got a birth date and categorizes the client into the appropriate age bracket. This puts the client into two different categories and makes your report wrong or at least confusing.

Second, Consider what happens with backdating the HUD Universal Data Elements Assessment.



The implication of this, when you run a Clients Served report is that the software reads that the client entering the program on March 15 had a birth date and will put the client into the appropriate age bracket. This puts the client correctly into one category and makes your report correct.

1.3 Where do I backdate my information? [\(back\)](#)

The simple answer is everywhere that you see a date field. The list of these locations is as follows:

<u>LOCATION</u>	<u>FIELD</u>
✓ ASSESSMENT (<i>BACK DATE MODE</i>)	ASSESSMENT DATE (<i>click Back Date Mode</i>)
✓ HOUSEHOLD	ENTRY DATE
✓ ENTRY / EXIT	(<i>creating or adding a client to a household</i>) – DATE ENTERED (<i>continue adding household member</i>) – DATE ENTERED
✓ SERVICE TRANSACTION	(<i>need / diagnosis</i>) – DATE OF NEED DIAGNOSIS (<i>services provided for need identified</i>) – SERVICE START DATE
✓ SHELTERPOINT	DATE IN

❖ **SECTION 2** How do I backdate? [\(back\)](#)

Backdating comes in two forms.

1. Backdating can simply be filling in the date fields for the various functions in Wisconsin ServicePoint with the correct historical date.
2. Backdating can also mean making the system go back in time or changing the “effective date,” so that WIP thinks it is literally a date in the past. This is using the backdate mode.

Depending on what you are doing, you will likely employ both methods. The following is a brief summary of which method to use in the various WISP functions.

Change the Date Field for the following:

- ✓ Households
- ✓ Entry / Exit
- ✓ Service Transaction
- ✓ Shelter Point

Use Back Date Mode for Assessments:

- ✓ HUD Universal Data Elements
- ✓ HUD 40118 Assessment
- ✓ WI Assessment
- ✓ WI Medical Assessment
- ✓ WI Exit Assessment

2.1 How do I backdate an Assessment? / How do I use Backdate Mode? [\(back\)](#)

Reporting from assessments, or sets of questions about the clients in Wisconsin ServicePoint, are based on the “effective date” that information was entered into them. For demographic information about a client to be backdated in the assessments, you must enter that demographic information in “backdate mode.” Backdate mode fools the system into looking exactly like it would have looked, had you entered the client into WISP on the day the client came into your program or received a service.

To use the “Backdate Mode,”

1. enter the actual date on which the Assessment information was collected or when the client entered the program, and then,
2. click on the Back Date button (*Shown Below*).

The screen will refresh and there will be a bright yellow header and footer surrounding the Assessment to indicate that you are entering data for a day in the past.

The “Backdate Mode” applies to Assessment information only when that information is on the Profile or Assessment screens.

All other Client-specific data elements can be “backdated” by simply changing the date when entering the information into ServicePoint.

HUD Universal Data Elements [\(Backdate Mode\)](#) [Return to Live Mode](#)

Assessment Date: 01/01/2005 12:01 AM [Back Date](#)

Items in red are HUD universal data elements.

Date of Birth 2.3: 05/05/1955 (mm/dd/yyyy) H G

Ethnicity 2.4.1: - Select - H G

Race 2.4.2: American Indian or Alaska Native (HUD) H G

Gender 2.5: Male H G

Is Client U.S. Military Veteran? 2.6: - Select - H G

Do you have a disability of long duration? 2.7: - Select - H G

[Back Date Button](#)

Please note that the system tags an answer with an “effective date” at the time that a question is answered. It is therefore critical that before an assessment question is saved that the assessment be put into backdate mode.

To return to the current system date and time, the User must click on the “Return to Live Mode” link located at the right-hand side of the yellow header. Until this is done, the User will remain in “Backdate Mode”.

2.2 How do I backdate the Add / Find Screen? [\(back\)](#)

When you fill out information on the Add / Find Client screens, the system automatically tags each of those answers as having been entered on the calendar date that you are actually entering the data. In other words, *you cannot backdate information on the Add find screens.*

This means that if you are entering a new client into the system and are going to backdate that information, you will need to enter birth date, gender, race and ethnicity in the HUD Universal Data Elements Assessment on the Client Profile Screen while it is in backdate mode. This pertains to single clients, heads of households and all the household members.

First * MI ☐ Last * Suffix
SS# * - -
SSN Data Quality

-Select-

Date of Birth 2.3 (mm/dd/yyyy)
Gender 2.5

- Select -

Race 2.4.2

- Select -

Ethnicity 2.4.1

- Select -

Search Filter ☐ Exact Match?

Add / Find Client Add As Anonymous Client

The system automatically tags the answers to these questions with the current calendar date.

2.3 How do I backdate household information? [\(back\)](#)

To backdate the creation of a household, enter the date prior to the day that a client and his or her household enters the program or receives a service. This date will need to be entered twice, both (a) when setting up the household from in the “Add Client to Household” box and (b) in the box where you answer questions about the other members of the household and their relationship to the head of that household - “Add Clients to Household.”

NOTE: If the dates for the creation of a client’s household to do not precede the client’s entry into a program, the system will treat the client as a single entering the program, and not as a household.

When adding members to a household, remember that date of birth, gender, race and ethnicity must all be entered in backdate mode on the Client Profile page in the HUD Universal Data Elements Assessment. To do this you must go back into the individual files of the household members.

Enter the date or the day prior to the date that the client and the client’s household members entered a program or received a service.

Household Type (if starting new household)

-Select-

Head of Household

-Select-

Relationship to Head of Household:

-Select-

Date Entered 01/01/2005 (mm/dd/yyyy)
Date Removed (mm/dd/yyyy)

Start NEW Household Add to EXISTING Household Cancel

Overview - Type: Client, # Clients: 1 Edit household type

Name	Relationship	Date Entered	Date Removed	Head of Household
Smith, Son	other relative	01/01/2005		

Continue Adding Household Member
Client Smith, Sam
Head of Household

-Select-

Relationship to Head of Household:

-Select-

Date Entered 01/01/2005 (mm/dd/yyyy)
Date Removed (mm/dd/yyyy)

Add Household Member Cancel

2.4 How do I backdate an Entry / Exit for a single person?

[\(back\)](#)

To date, enter the actual date on which the client would have entered the program, then fill out the assessment attached to the Entry. For Exits enter the date on which the client would have exited the household.

Enter the date on which the client enters and exits the program

Entry Data	
Provider	WI Department of Commerce (#2)
Type	HUD-40118
Entry Date	01/01/2005 09 : 24 AM

Exit Data	
Exit Date	03/28/2005 09 : 26 AM

QUICK STEPS

- ✓ **ADD / FIND CLIENT**
- ✓ **BACK DATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
- ✓ **CREATE AN ENTRY EXIT. BACK DATE THE ENTRY DATE**
- ✓ **FILL OUT THE QUESTIONS ATTACHED TO THE ENTRY**
- ✓ **WHEN EXITTING, CLICK ON PENCIL UNDER EXIT & ANSWER EXIT QUESTIONS**

2.5 How do I backdate an Entry / Exit for a household?

[\(back\)](#)

In order for the Entry / Exit reports to retrieve the answers to the assessment questions, the “effective date” of the answers must precede the creation of the entry exit. Therefore answers to the Universal Data Elements and the HUD 40118 Assessments for all household members must be filled out prior to the creation of the Entry /Exit.

Household members

To include household members in this entry/exit, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

☒ **Sample, Child**

Entry Data	
Provider	WI Department of Commerce (#2)
Type	- Select -
Entry Date	01/01/2005 03 : 16 PM

Enter the date on which household enters and exits the program

QUICK STEPS

- ✓ **ADD / FIND CLIENT (HEAD OF HOUSEHOLD)**
- ✓ **CREATE AND BACKDATE HOUSEHOLD**
- ✓ **FOR EVERY MEMBER OF THE HOUSEHOLD:**
 - BACKDATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
 - BACKDATE AND FILL OUT THE HUD 40118 ASSESSMENT**
- ✓ **IN THE FILE OF A HOUSEHOLD MEMBER, CREATE AND BACKDATE AN ENTRY / EXIT**
- ✓ **CLICK ON THE NAMES OF THE MEMBERS IN THE HOUSEHOLD WHO ARE ALSO RECIEVING THE SERVIC OR ENTERING THE PROGRAM.**
- ✓ **WHEN EXITTING, CLICK ON PENCIL UNDER EXIT & ANSWER EXIT QUESTIONS**

2.6 How do I backdate a service transaction for a single person?

[\(back\)](#)

In order for the Clients Served reports to retrieve the answers to the assessment questions, the “effective date” of the answers must precede the creation of the Service Record. Therefore answers to the Universal Data Elements Assessments for the client must be filled out prior to the creation of a Service Record. This date will need to be answered twice: once in the Need/Diagnosis, and second in the Services Provided for Need Identified “Service Start Date.”

The screenshot shows two sections of a form. The top section, titled "Need / Diagnosis", has a "Provider" dropdown set to "WI Department of Commerce (#2)" and a "Date of Need / Diagnosis" text box containing "01/01/2005". The bottom section, titled "Service Provided Data (A Sample Client)", has a "Provider" dropdown set to "WI Department of Commerce (#2)". The "Service" section includes a dropdown menu set to "-Select Need from Quicklist-", a text box containing "Basic Needs", and another text box containing "B". The "Service Start Date" is set to "03/28/2005" with time set to "12 : 26 PM". The "Service End Date" is empty. A bracket on the left side of the form points to the "Date of Need / Diagnosis" and "Service Start Date" fields, with the text "Enter the date on which the client receives a service."

QUICK STEPS

- ✓ **ADD / FIND CLIENT**
- ✓ **BACK DATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
- ✓ **IN SERVICE TRANSACTIONS, CREATE AND BACK DATE A NEED FOR THE CLIENT**
- ✓ **SAVE CHANGES (REFRESH THE SCREEN) AND CREATE A SERVICE FOR NEED IDENTIFIED**
- ✓ **BACK DATE START DATE**
- ✓ **(IF SAME DAY SERVICE) BACK DATE END DATE WITH SAME DAY AS START DATE**

2.7 How do I backdate a service transaction for a household?

[\(back\)](#)

In order for the Clients Served reports to retrieve the answers to the assessment questions, the “effective date” of the answers must precede the creation of the Service Record. Therefore answers to the Universal Data Elements Assessments for all household members must be filled out prior to the creation of a Service Record. This date will need to be answered twice: in the Need/Diagnosis and in the Services Provided for Need Identified “Service Start Date.”

QUICK STEPS

- ✓ **ADD / FIND CLIENT (HEAD OF HOUSEHOLD)**
- ✓ **CREATE AND BACKDATE HOUSEHOLD**
- ✓ **FOR EVERY MEMBER OF THE HOUSEHOLD:**
 - BACK DATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
- ✓ **IN SERVICE TRANSACTIONS, CLICK ON MEMBERS OF HOUSEHOLD WHO ALSO RECIEVED THE SERVICE AND CREATE AND BACK DATE A NEED FOR THE CLIENT**
- ✓ **SAVE CHANGES (REFRESH THE SCREEN) AND CREATE A SERVICE FOR NEED IDENTIFIED**
- ✓ **BACK DATE START DATE**
- ✓ **(IF SAME DAY SERVICE) BACK DATE END DATE WITH SAME DAY AS START DATE**

2.8 How do I backdate in ShelterPoint for a single person? [\(back\)](#)

To backdate in ShelterPoint, enter the date that a client first entered the shelter. In order to backdate a client in Shelter Point the information about that client must first be entered into ClientPoint and be appropriately backdated there.

Enter the date on which
the client enters a
shelter.

Bed Stay Data - A Sample Client #3164 (Female 11/11/1974 123-45-6789)

Date In: 03/28/2005 12 : 37 PM [Midnight Checkin](#)

QUICK STEPS

- ✓ **ADD / FIND CLIENT**
- ✓ **BACK DATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
- ✓ **IN SHELTER POINT, CLICK ON EMPTY BED**
- ✓ **CHANGE DATE IN TO APPROPRIATE BACK DATE**

2.9 How do I backdate in ShelterPoint for a household? [\(back\)](#)

To backdate in ShelterPoint, enter the date that a client first entered the shelter. In order to backdate a client in Shelter Point the information about that client must first be entered into ClientPoint and be appropriately backdated there.

Enter the date on which
the household enters a
shelter.

Bed Stay Data - A Sample Client #3164 (Female 11/11/1974 123-45-6789)

Date In: 01/01/2005 04 : 20 PM [Midnight Checkin](#)

Bed Name/Number: ** 01

Supplies given:

Locker #:

Codes/Notes:

Household members

To checkin household members also, click on the box beside each name. Then assign each member a bed. If no bed is specified, an Overflow bed will be used. Note: Only members from the same household may be selected.

Household #1 Members:

<input checked="" type="checkbox"/> Sample, Child	** 02	1041	Assign Bed
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QUICK STEPS

- ✓ **ADD / FIND CLIENT (HEAD OF HOUSEHOLD)**
- ✓ **CREATE AND BACKDATE HOUSEHOLD**
- ✓ **FOR EVERY MEMBER OF THE HOUSEHOLD:**
 - ✓ **BACK DATE AND FILL OUT THE HUD UNVIERSAL DATA ELEMENTS ASSESSMENT**
 - ✓ **IN SHELTER POINT, CLICK ON EMPTY BED**
 - ✓ **CHANGE DATE IN TO APPROPRIATE BACK DATE**
 - ✓ **CLICK ON HOUSEHOLD MEMBERS WHO ARE ALSO ENTERING SHELTER AND ASSIGN EACH A BED**

❖ SECTION 3 How do I resolve problems with backdates? [\(back\)](#)

As backdating comes in two forms backdating after the fact or correcting information that should have been backdated also comes in two forms. Backdating is either:

- 1) filling in the date fields for the various functions in Wisconsin ServicePoint with the correct historical date or
- 2) it is also forcing the system to go back in time or changing the “effective date,” so that WISP thinks it literally is a date in the past known as using the backdate mode.

Which method to employ for each function is listed below.

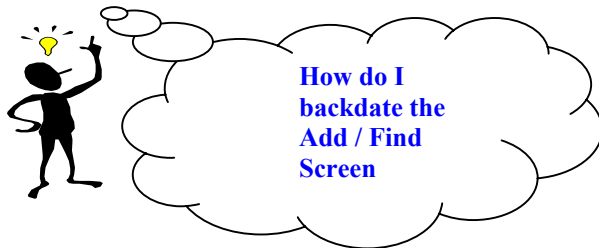
<u>Change the Date Field for the following:</u>	<u>Use Back Date Mode for Assessments:</u>
✓ Households	✓ HUD Universal Data Elements
✓ Entry / Exit	✓ HUD 40118 Assessment
✓ Service Transaction	✓ WI Assessment
✓ Shelter Point	✓ WI Medical Assessment
	✓ WI Exit Assessment

For **Change the Date Field** go back into the record in question using the pencils to drill down to the part of the record that requires changing, change the date and save changes.

For **Using Back Date Mode** unfortunately there is no way to change the effective date for answers in the assessments. The only way to backdate assessment questions is to go into backdate mode and then re-answer the questions.

3.1 Why, when I enter a new client and fill out race, gender and DOB, and then go into Assessments to backdate my information, do I lose information?

Unfortunately there is no way to correct or backdate the information you enter on the add / find screen. You will have to put the HUD Universal Data Elements Assessment into backdate mode and re-answer the gender, date of birth, race and ethnicity questions.



3.2 Why doesn't my client demographic information come through in my reports? & 3.3 Why do some clients who I know are in households show up in my reports as singles? [\(back\)](#)

Both of these issues are often the result of timing. It is important in backdating that the effective date and time of a response to an assessment question or the creation of a household be before a client or a household is entered into a program or given a service.

To see how to back into a record to make sure backdating was done correctly, and that effective date and time of question should make come through in the report see [\(How do I resolve problems with backdates?\)](#)